TransForm works to create world-class public transportation and walkable communities in the San Francisco Bay Area and beyond. The organization builds diverse coalitions, influences policy and develops innovative programs to improve the lives of all people and protect the environment.

STARTING IN THE CLOUD

Headquartered close to Silicon Valley, it's no surprise that TransForm adopted the cloud based solution, Salesforce.com, for their organization-wide database of record. They knew their impact would be limited if their constituent data was housed in separate silos ranging from grassroots environmental and social justice activists to urban planners, business leaders and government and private funders.

CHOOSING CONVIO COMMON GROUND

Yet after 18 months using the free Nonprofit Starter Pack provided by the Salesforce Foundation, TransForm staff was still struggling with its limitations. They were facing the prospect of customizing the commercial database to meet their needs essentially reinventing the wheel for a lot of nonprofit-specific functionality, plus maintaining those capabilities long-term. The Salesforce support department had limited knowledge of the Nonprofit Starter Pack, so TransForm staff turned to a local nonprofit user group, where they heard about Convio Common Ground®.

IMMEDIATE RESULTS

TransForm wanted to expand their capabilities beyond what the Nonprofit Starter Pack had to offer; such as the ability for email subscribers to sign-up and manage their own subscription preferences online. Staff worried about the security of online credit card processing, and spent hours launching donation and event ticketing forms for their constituents to fill out on their website. And when supporters did make online transactions, it meant hours of hand-typing data into the Salesforce database, with plenty of room for data entry errors. Follow-up with online donors and registrants was often delayed due to the cumbersome manual processes.

Because Common Ground is built on the Salesforce platform, and is already configured for the needs of nonprofits "the integration of the online forms is fantastic," says Seth Goddard, Online Communications and Database Manager at TransForm. "It takes just a few minutes to launch secure forms and plug them into our Drupal website, and all the data is automatically populated into our database." Email subscriptions (and updates) are self-service on the website. Six to eight times per year, TransForm hosts "Trans-Forum" events, where the community is engaged in live discussions about transportation challenges and improvements. "It took hours of work hand-coding custom PHP to launch online registration forms for our

QUICK SUMMARY

- Had used the Salesforce Nonprofit Starter Pack, but found it lacking key capabilities related to supporter households, grant funding and interactive web forms

- Relieved labor-intensive data entry workload and nagging worries about the security of online transactions with seamless online form integration, including zip code gathering for geo-targeting

- Migrated seventy-five grants, their milestones and reporting requirements from various spreadsheets into one system

- Reached Spring Appeal goal of $20K by including links to their online donation form throughout their Drupal website, email messages and social media

Trans-Forums before we got Common Ground, and that's a lot of work for a $5 ticket per person. But eliminating these community events was not an option, as they are too important for building public support for sustainable communities."

Using Common Ground, it takes only a couple clicks for the TransForm staff to include a required zip code field on any form. According to Seth, "TransForm requires zip codes, even for email sign-ups; because we find geo-targeting our messages by neighborhood helps us cut through the clutter and have specific, location-based dialogue with our constituents. Asking for an address is too much, but people will share their zip codes. With nearly 75 percent of our housefile zip coded, we can send relevant information to our activists and supporters."

Mailings had also been complex and time-consuming with the Nonprofit Starter Pack, since it had no concept of a household address or a household giving history. It was hard to get the right appeal to the right mailbox, without duplication. And because staff spent so much time moving data from one place to another, they didn't have streamlined processes to use holistic interaction data for smart segmentation.

With Common Ground in place, outbound communications could be informed with holistic constituent interaction data. People who petitioned decision-makers in favor of a bill were messaged differently from those who made financial contributions, and those who supported the organization in both ways could be thanked accordingly.

TransForm's most recent appeal was part of their Invest in Transit Campaign, which ran state-wide. The appeal was an "ask" made to their donor base and potential donors. With Common Ground, TransForm was able to include links throughout their website, email and social communications directly to the specific campaign's online donation form. "We were able to customize specifically for that appeal," explained Seth. "The look and feel and language was specific to the exact appeal, which gave us a consistent story from our homepage to our Donate Now page." Not only did TransForm reach their goal of $20K online, but saved a lot of staff time by avoiding data entry. All staff members appreciated not having to worry about security of the payment processing, or how to provide the secure certificates that online donors expect. "That's one less headache for nonprofits;"explains Seth, "not having to worry about the security of our credit card transactions."

Finally, the Salesforce platform and the free Nonprofit Starter Pack didn't come with grant management functionality, which was critical to TransForm. "Although grants from government agencies and private foundations represent the majority of our revenue, our grants were being tracked in a hodgepodge of

spreadsheets, and nobody knew which version was current. Key pieces of grant data existed in staff members' heads," explained Seth. "We weren't confident in our ability to forecast pledged and potential grant income, and with over 75 grants at various stages being worked at any one time—we were worried about missing deadlines and letting our programs down. Now that we've put all the grant data in one place, everyone is much more confident making decisions about expenditures." The organization now tracks grants in Common Ground throughout their lifecycle – from a twinkle in a grant writers' eye to renewal and beyond. They also keep records of all contacts known to influence grant making decisions. "We trained every one of our staff on how to blind-copy the database with any email messages to and from funders, so we can reference commitments, manage expectations and identify opportunities. This way, any staff turnover won't derail our year-over-year impact to the region we serve."

How does a local community foundation describe TransForm and their work?

"Relevant, relevant, relevant. Strategic. Collaborative."

— *Gina Dalma, Program Officer, Silicon Valley Community Foundation*

WHAT'S NEXT

TransForm has integrated their Facebook and Twitter accounts with their website (http://TransFormCA.org) for live 2-way interaction, but part of their success with growing their social fan-base comes also from integrating virtual "sign-posts" in other communications, showing the way for constituents who want to connect via social channels. With Common Ground's online fundraising forms, an online donor, subscriber, or event registrant receives an auto-responder email (for example, a donation receipt) that includes links to TransForm's Facebook and Twitter pages.
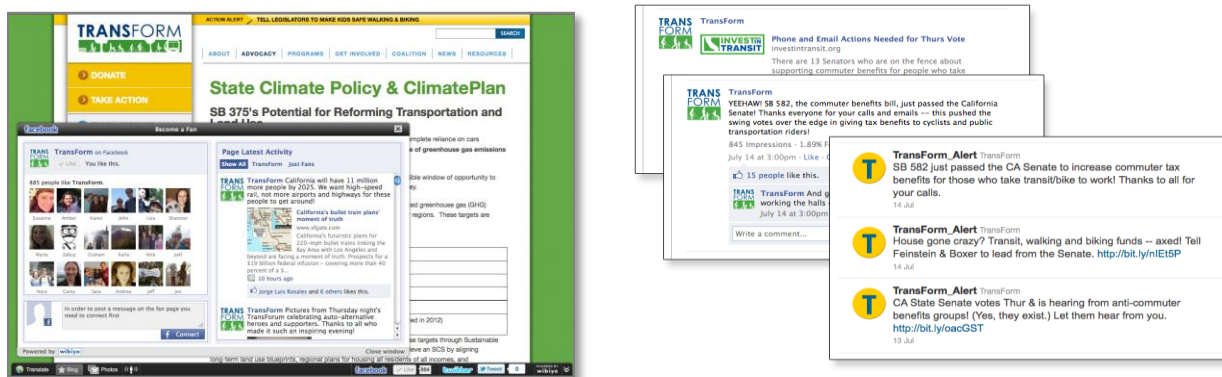
This kind of auto-responder message isn't customizable in all systems, and is often neglected in the communications plans of nonprofit staff. Yet messages like this arrive in constituents' inboxes right at the height of an interaction moment, perhaps during the constituent's most attentive moment this week, month, or year. TransForm hasn't failed to seize the moment, and is experiencing steady growth in social connections. With so many of their contacts having day jobs related to local businesses and schools, land development, the environment, and public policy, TransForm plans to tackle LinkedIn in 2012.

Another significant factor is the availability of the Convio team. "Common Ground is being maintained and upgraded continuously by a company with vast resources; we're not maintaining something on our own,"

remarks Seth. "Their support group is very attentive, very helpful. You get fast access to technical support and they handle cases really quickly – it's fantastic. With standard Salesforce, there was always a slight disconnect with the needs of a nonprofit. It was very much DIY [do it yourself]– which is probably why the user groups have proliferated across the country. The people at Convio really understand the nonprofit world and the technical world, too."

"Convio Common Ground is an industry leader. The people at Convio really understand the nonprofit world and the technical world."

— Seth Goddard, Online Communications & Database Manager, TransForm

CONCLUSION

TransForm's switch from the Salesforce Nonprofit Starter Pack has set them up for short and long-term success. No longer needing to reinvent the wheel when it comes to common fundraising functionality, the organization's expert staff can focus on getting further, faster with the flexibility of the underlying Salesforce platform—customizing only the portions of their database that inform their unique mission and set them apart from the rest. They also move forward with more confidence in their grant tracking, preventing potential data—and funding—losses, and by being more efficient means they can take advantage of every opportunity to engage the community, without signing up for lengthy data processing tasks. Since the transition, staff find their jobs easier than they used to be, and feel they've become more productive and effective overall.

ABOUT CONVIO

Convio is a leading provider of on-demand constituent engagement solutions that enable nonprofit organizations to maximize the value of every relationship. With Convio constituent engagement solutions, nonprofits can more effectively raise funds, advocate for change and cultivate relationships with donors, activists, volunteers, event participants, alumni and other constituents. Convio offers two open, cloud-based constituent engagement solutions: Convio Common Ground CRM® for small- and mid-sized nonprofits and Convio Luminate™ for enterprise nonprofits. Headquartered in Austin, Texas with offices across the United States and United Kingdom, Convio serves more than 1,500 nonprofit organizations globally. Convio is listed on the NASDAQ Global Market under the symbol CNVO. For more information visit www.convio.com.

888-528-9501 | 512-652-2600 | info@convio.com
www.convio.com